Instruction for Completing the Self-Assessment in COPA

In 2013, all FSS Head Start delegate agencies are required to utilize the COPA Monitoring module to streamline the self-assessment reporting process. This manual will provide step-by-step instructions on how to use the COPA Monitoring module to enter and update the self assessment information and store the self-assessment documentations. It includes eight sections and one appendix:

I. Accessing Module;
II. Activating Module;
III. Logging into System;
IV. Completing Self-Assessment Reports;
V. Signing Completed Self-Assessment Reports;
VI. Uploading Signed Self-Assessment Documents;
VII. Running a Report;
VIII. Completing Action Plans.

Appendix:
COPA eDOCS User Manual

I. Accessing Module

Who should have access to the modules?

COPA users in the Manager Level should have access to the COPA monitoring module. In order to store the self-assessment documentations, the Manager user should also be given an access to the COPA eDOCS module.

II. Activating COPA Monitoring and eDOCS Modules

COPA access does not automatically grant a Manager user Monitoring and eDOCS accesses, and a Manager user must obtain Monitoring and eDOCS modules' accesses from their agency COPA Administrator. In order to access the Monitoring and eDOCS modules, a Manager user's profile must be adjusted to include those access privileges. **A COPA Administrator**

1. Goes to the user profile (Image 1), below the User Privileges and Special Access Restrictions sections, click on the **COPAorg Privileges** button to activate the Monitoring module and click on the **E-Docs Privileges** button to activate the eDOCS module.

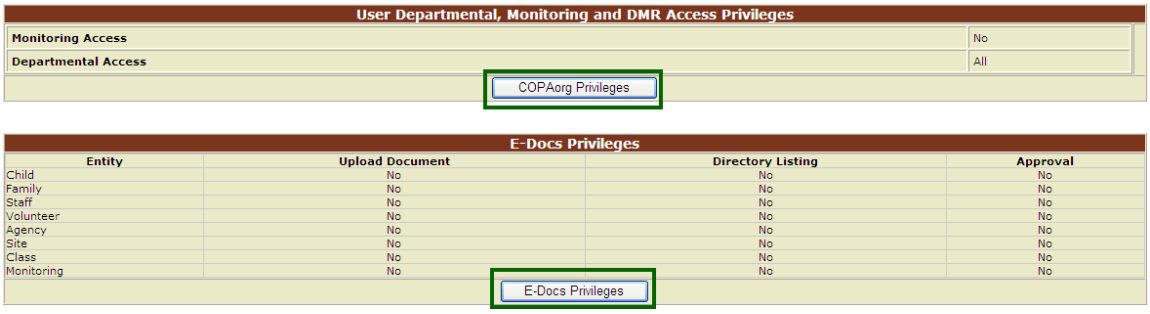
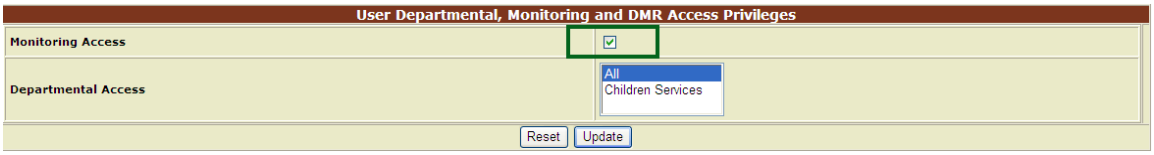


Image 1: Going to User Profile

2. Once you have clicked on the **COPAorg Privileges** button, the monitoring panel (Image 2) opens up to display a check box and a list menu. Monitoring Access allows the user to access the monitoring module and

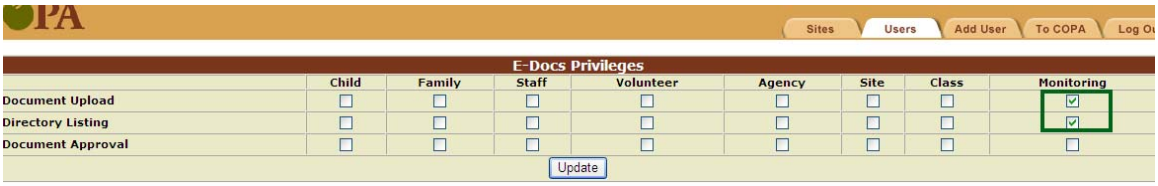
Departmental Access allows the user to add track an agency/a site visit which should be associated with department. Check the **Monitoring Access** box and click the **Update** button (Image 2).



[Image 2: Going to COPA Monitoring]

3. Once you have clicked on the **E-Docs Privileges** button, the eDOCS panel (Image 1) opens up to display three rows of check boxes. Document Upload allows the user to upload and save documents to a specific entity, such as a child, family, staff, monitoring etc. Directory Listing allows the user to see the lists of documents by searching and filtering the entity pages to which s/he has access. Document Approval allows the user to edit the document status: Pending and Approval. Check the two boxes of **Document Upload and Directory Listing** which the user should have access to, and click the **Update** button.

   ***Optional*:** Document Approval is optional. If this option has been enabled, this user would be given the ability to update the document statue (Appendix: eDOCS User Manual, Page 9) from approval to pending or vice versa. We highly recommend enabling this option only for COPA Administrator.



[Image 3: Going to COPA eDOCS]

III. Logging into COPA

Once COPA Administrator in your agency/site activates the Monitoring and eDOCS modules for a manager user, s/he can log into COPA with his/er Manager account.

1. Type **cys.mycopa.com** in the internet browser and go to the COPA home page.
2. Enter your **User Name** and **Password**.
3. Click **Continue.**
4. COPA displays the COPA agency/site page.

IV. Completing the Self-Assessment Reports

1. On the COPA agency/site page, click on the **Monitoring** tab (Image 4) displayed at the top of the screen, you will go to the Monitoring module.

Image 4: Going to COPA Monitoring

a. PLEASE NOTE THAT "SITE MONITORING" IS REFERRING TO THE "SELF ASSESSMENT" REPORT THAT YOU ARE COMPLETING.
b. "SITE VISITS" ARE THE OHS CATEGORIES TO ENTER THE SELF ASSESSMENT DATA.
c. "SITE VISIT TYPE" IS REFERRING TO THE SEVEN AREAS OF THE MONITORING REPORTING TOOL, e.g., Child Development and Education.

2. Once you have clicked the Monitoring tab, you will go to the Site Monitoring page (Image 5).

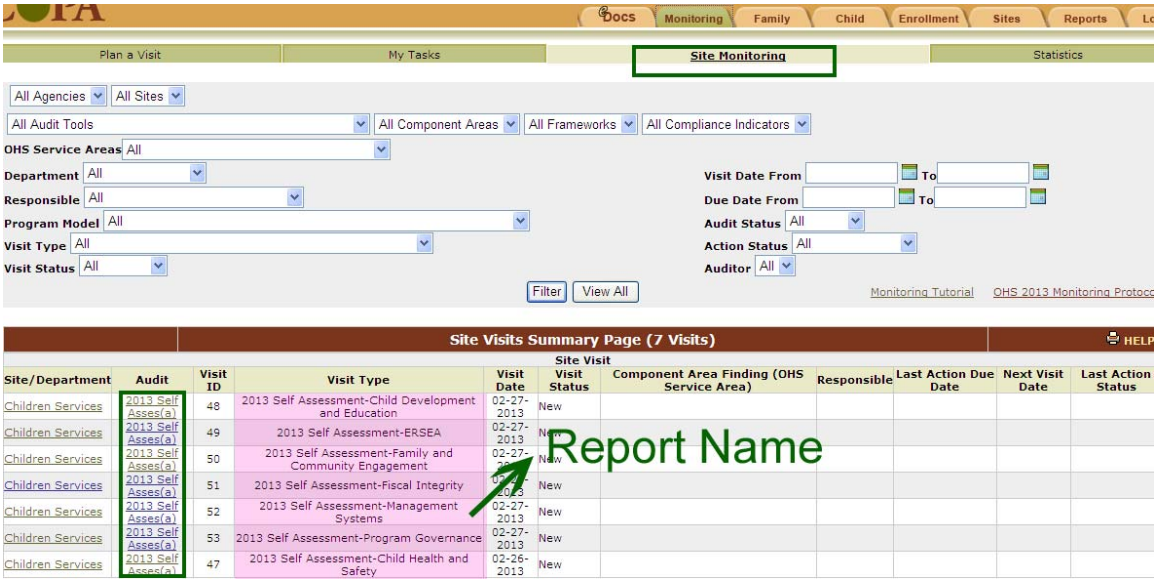


Image 5: Going to Site Monitoring

On the Site Visits Summary page:

a) "Audit" means the 2013 Self Assessment component areas.
b) Each Audit will refer to the same "Visit Type."
c) There are seven self-assessment component areas that will produce reports (Image 5)

1. **2013 Self Assessment-Child Development and Education**
2. **2013 Self Assessment-ERSEA**
3. **2013 Self Assessment-Family and Community Engagement**
4. **2013 Self Assessment-Fiscal Integrity**
5. **2013 Self Assessment-Management Systems**
6. **2013 Self Assessment-Program Governance**
7. **2013 Self Assessment-Child Health and Safety**

2. To begin entering self assessment report information, click on the **Link called "2013 Self Assess (a)"** in the **Green Rectangle** (Image 5). Once you have clicked on "2013 Self Assess (a)", the screen shown below appears (Image 6).

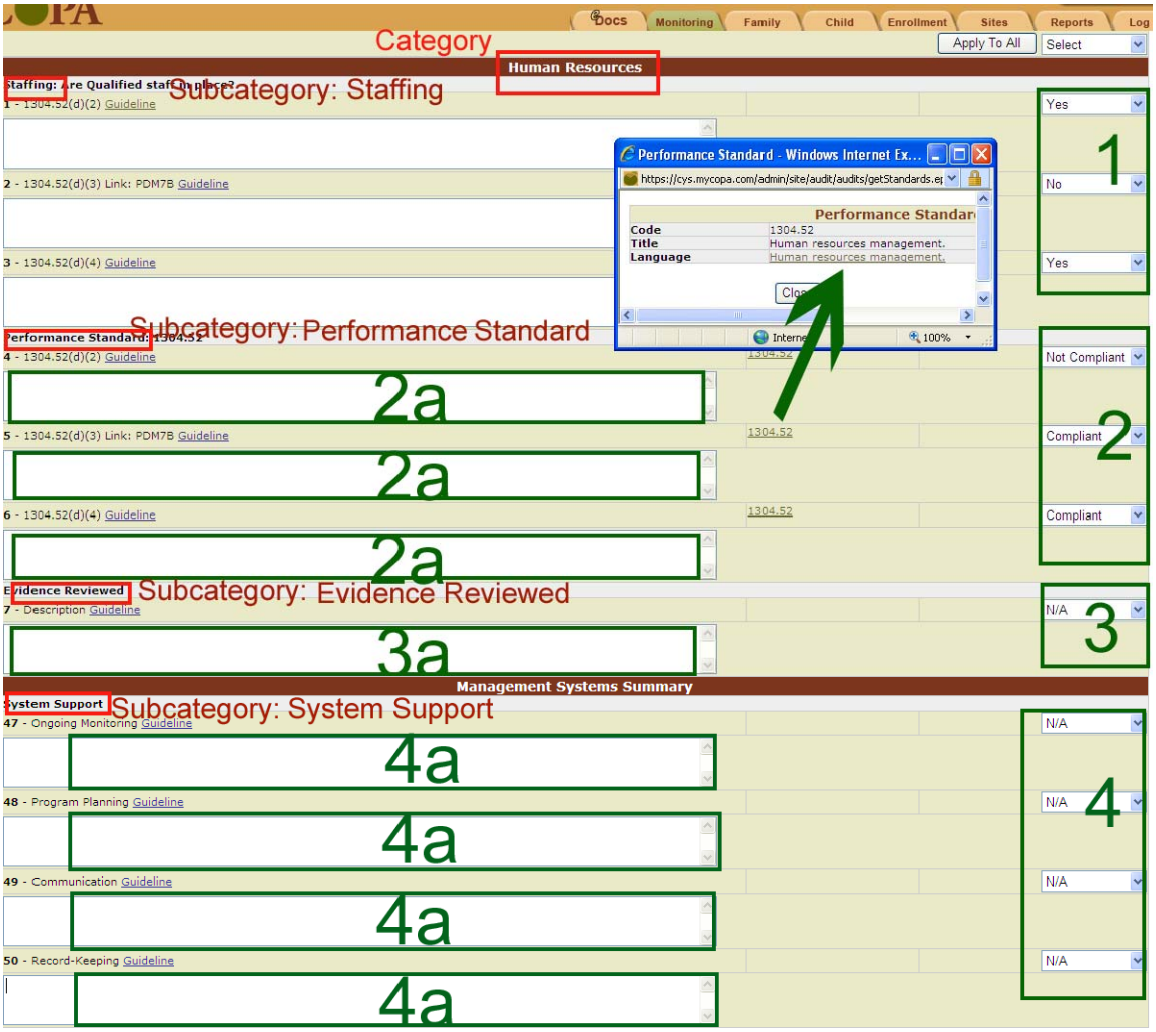


Image 6: Going to Self-Assessment Report

In order to accurately complete the 2013 Self-Assessment reporting, it is important to enter information for all seven reports by following the instructions below:

3. There are several categories in each SA component area. For example, in Child Health-Safety, the categories are Human Resources, Access to Health Care, Screening and Referral, Management Systems Summary, and etc. Each category has two standard subcategories: **Performance Standard** and **Evidence Reviewed.** If the category is *Human Resources***,** a subcategory called **Staffing** is included also. If the category is *Management Systems Summary***,** it has only one subcategory called **System Support.**

   a. If the subcategory is Staffing, select **Yes/No** on the **1** dropdown menu (Image 6).
   b. If the subcategory is Performance Standard: select **Compliant/Not Compliant** on the **2** dropdown menu (Image 6).
   c. *Staffing in Human Resources at the beginning of each service component area is establishing whether there is appropriately qualified staff in place for these areas.*
   d. Click on the Performance Standard Link to see the requirements for the qualifications for these staff.

e. For each Sub Category, the "Guidance" at the beginning of the section provides information for what is required for the entire sub-category. The Performance Standards Link provides the standard that governs each category.

f. Enter **Description of the Non-Compliance** on the 2a text box if that area is not in compliance with the performance standard.

g. If the subcategory is Evidence Reviewed: select **N/A** on the **3** dropdown menu.
Enter **Description of any Evidence Reviewed for this category** in the 3a text box.

h. If the subcategory is System Support: select **N/A** on the **4** dropdown menu.
Enter **Description of your management systems support different service areas** on the 4a text box. ***This section is optional but highly recommended.***

4. When you have finished entering all the self assessment information, the bottom of the screen will lead you to two options. These options are **"Save"** and **"Complete"** (Image 7). **"Save"** will save existing self-assessment information and will allow you go back to edit existing information, while **"Complete"** will submit your report to DFSS and will not allow you go back and edit existing information. Before clicking the Complete button, you need to update the **Date** in the red rectangle for **Completion** (Image 7).

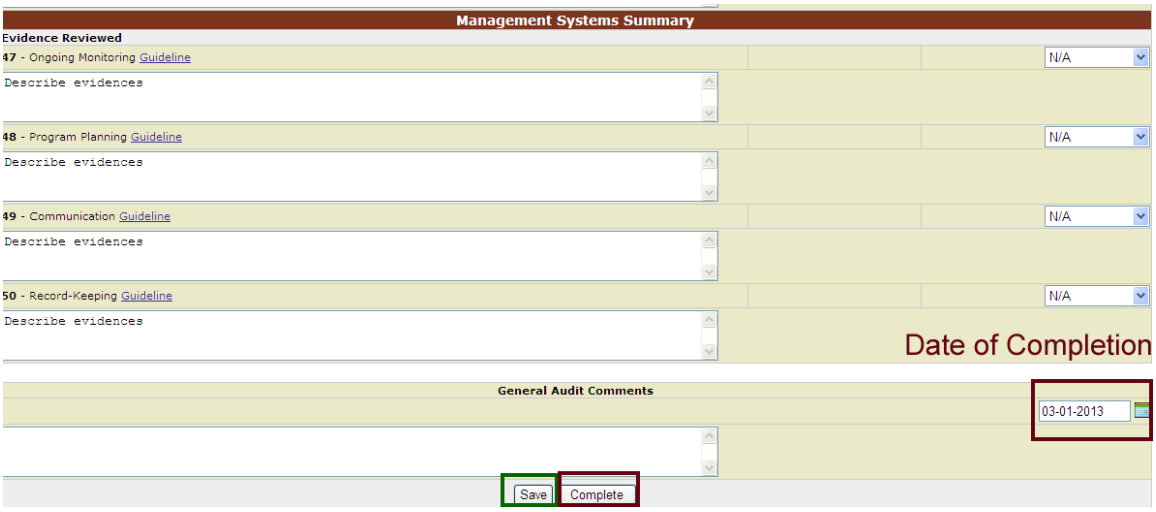


Image 7: Saving/Completing Reports

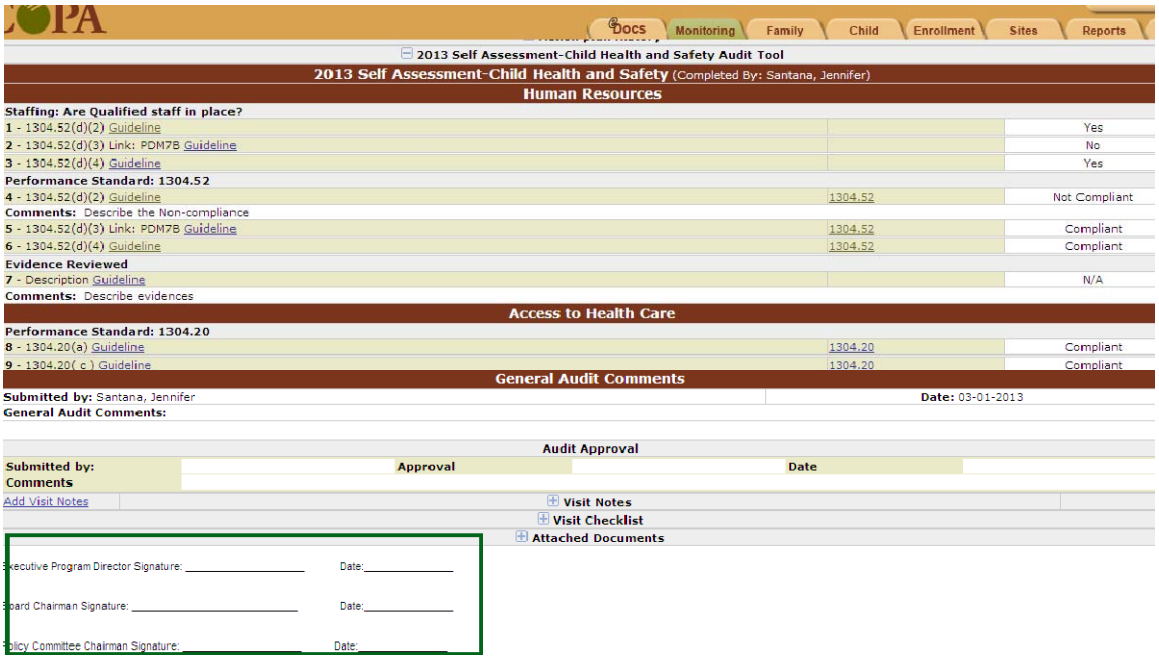
*****Please be informed that if you have already submitted your report to DFSS and you need to edit the report information, please contact Paulette Mercurius at Paulette.Mercurius@cityofchicago.org for assistance**.

V. Printing and Signing 2013 Self-Assessment Reports

Once you have clicked the **Complete** button, you will go to the Visit Summary page (Image 8).

[Image 8: Going to Visit Summary]

Click the **"+"Icon** next to the 2013 Self Assessment-Audit Tool (Image 8), a completed report will appear on the same page with the signature statements on the bottom (Image 9). **Print** each report and **sign** it.



[Image 9: Printing and Signing Reports]

Note: The Policy Committee and Board Approval signature pages are to be submitted as an attachment. A link has been provided to download the document on the Children Services website.

VI. Uploading Signed 2013 Self-Assessment Reports

1. Once you have **Scanned** the seven signed 2013 self-assessment reports separately and separately have **Saved** it in your PC in **.PDF** format, you can start to upload it to COPA.

2. Click the **Site Monitoring** link on the green navigation bar and click each **Link** in the green rectangle to upload the signed document separately (Image 10).

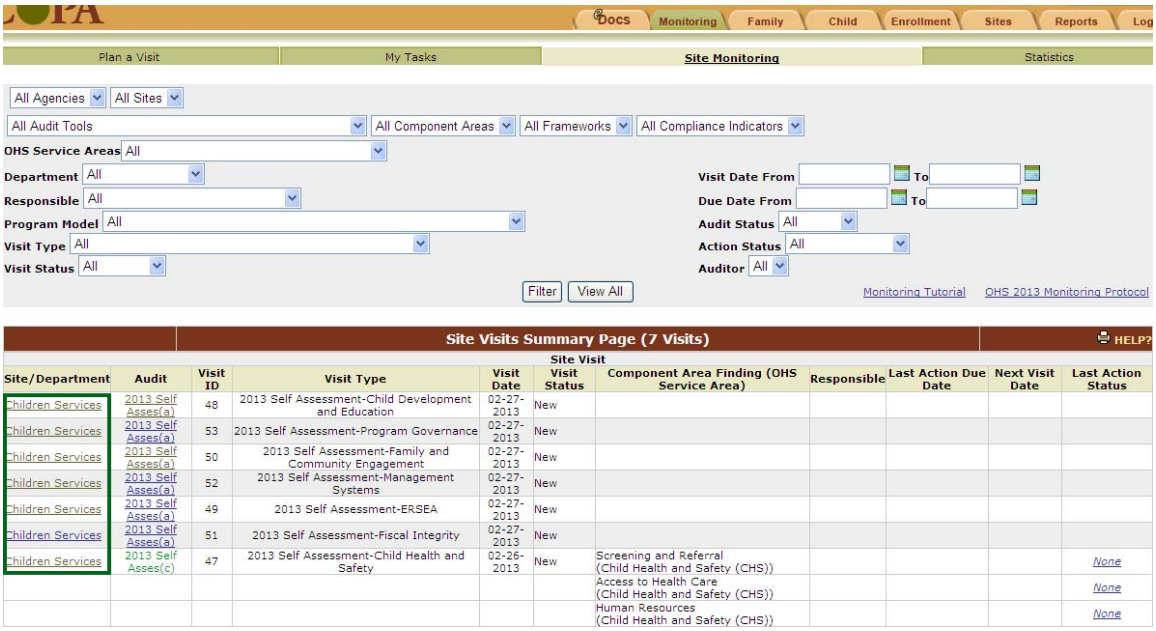


Image 10: Going to the Reports

3. Once you have clicked the Link, you will go to the Visit Summary page and find three links displayed: **Visit Summary**, **Visit eDOCS**, and **Site Monitoring**. Click the **Visit e-Docs** link (Image 11) to go to the Document Upload page.

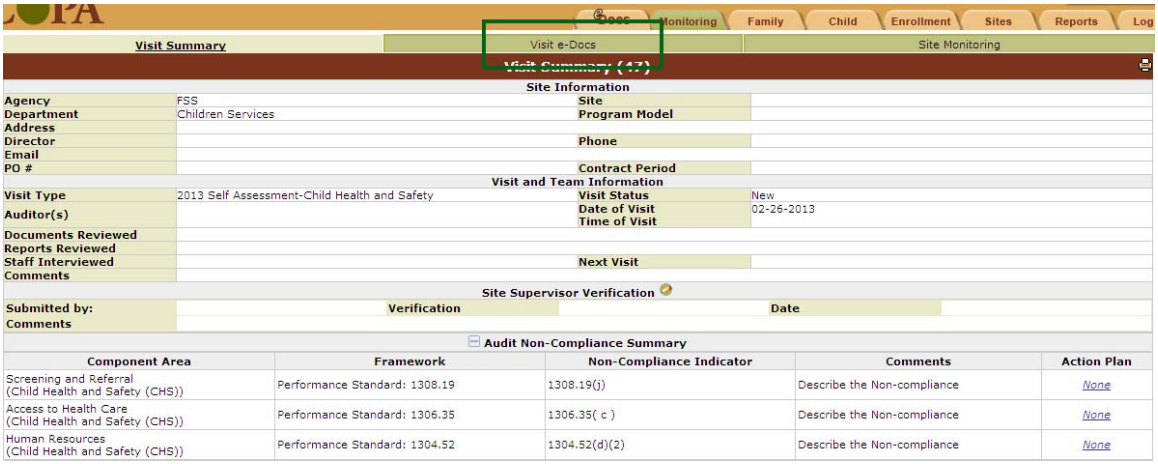


Image 11: Going to Visit e-Docs

4. Once you are on the Upload Document page, you can start uploading documents.

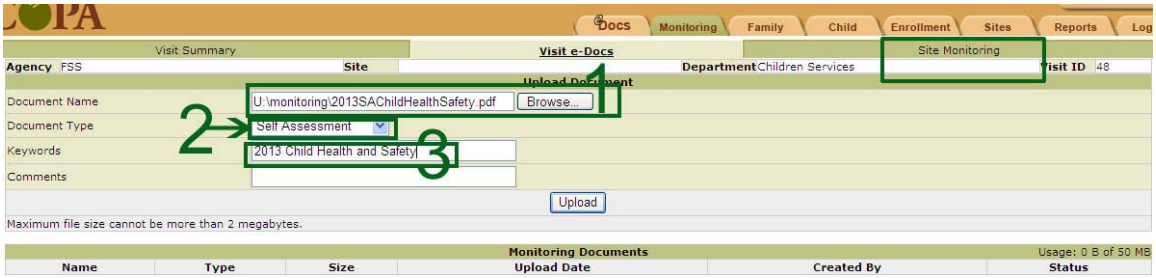


Image 12: Uploading Documents

a. Click the **Browse** button to upload the signed report (Image 12);

b. Select **Self Assessment** as the Document Type (Image 12);

c. Enter **the Name of the Report** in the Keywords field. (If the report is called Child Health and Safety, enter **2013 Child Health and Safety**) (Image 12).

Optional: Comment is optional and can be edited later by COPA Admin. This will make it easier for you to find the document in the Document Directory late (Appendix: eDOCS User Manual).

5. Click the **Upload** button to upload the document (Image 12).

**** Please be informed that all documents you have uploaded to eDOCS through the Monitoring module are available for editing in the Monitoring section of the eDOCS module.**

**** Please be informed that you can't run a report and complete action plans until you click the complete button (Image 7) for the report.**

VII. Running a Report

Once you have completed uploading the documents, click on the **Site Monitoring** button (Image 12) on the navigation bar, you will find a Statistics button displayed on the green navigation bar. Once you have clicked on the Statistics button, the monitoring statistic report shown below appears (Image 13).

Image 13: Running a Report

VIII. Completing Action Plans

1. To add action plans, you need to go back to the Site Monitoring page by clicking on the **Site Monitoring** button on the navigation bar. Once you have clicked the Site Monitoring button, the screen shown below (Image 14) appears.

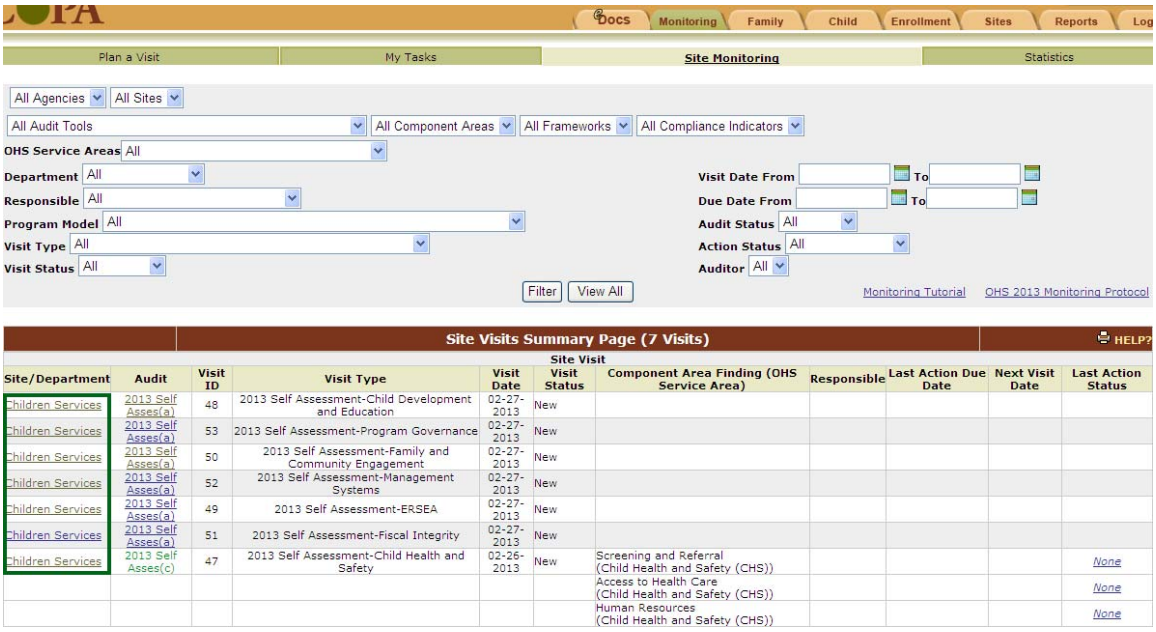


Image 14: Going to Site Monitoring

1. Click a **Link** associated with a completed self-assessment report in the green rectangle (Image 14), the screen shown below (Image 15) appears. Click each Action Plan Link in the green rectangle (Image 15) on your right hand side to enter the action plan information for non-compliance finding.

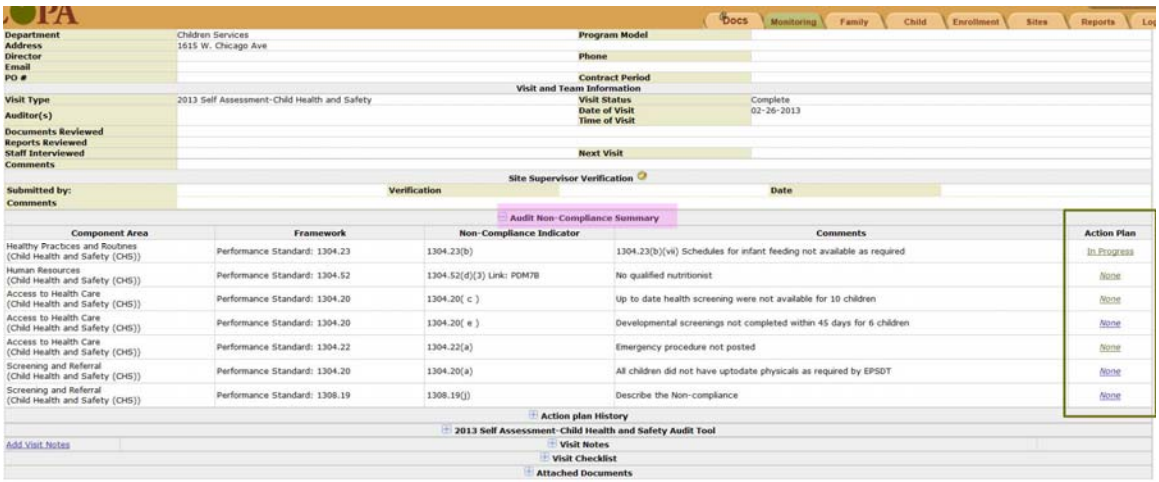
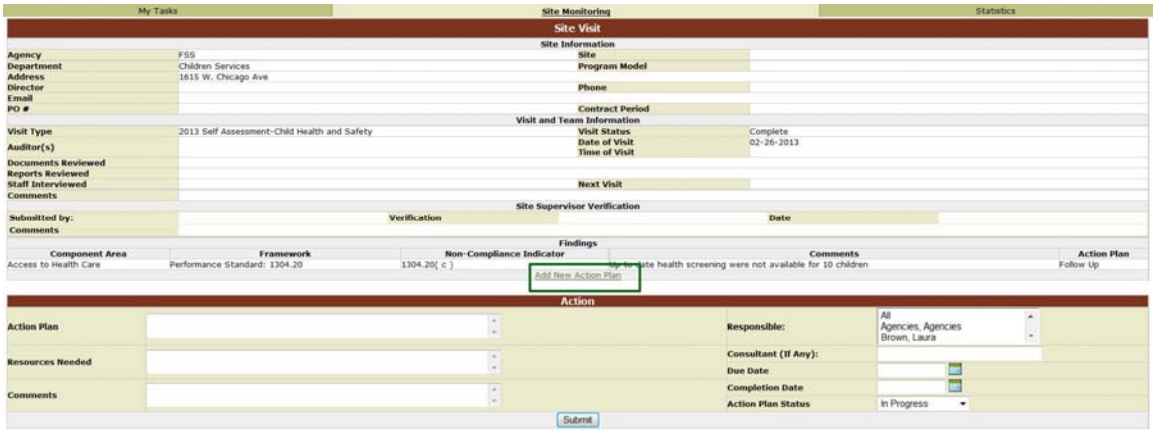


Image 15: Going to Non-Compliance Summary

2. Once you have clicked on the action plan link, the screen shown below appears (Image 16). Once you have clicked the Add New Action Plan link in the green rectangle (Image 16), an action plan data entry page will display on the same page (Image 16). At this point, you can add the information. Please note that you can add multiple action plans for one non-compliance finding.



[Image 16: Adding New Action Plan]

For further questions, comments or concerns please contact Craig Zemke at Craig.Zemke@cityofchicago.org or Jennifer Santana at Jennifer.Santana@cityofchicago.org.

Appendix: COPA eDOCS User Manual

COPA eDOCS User Manual

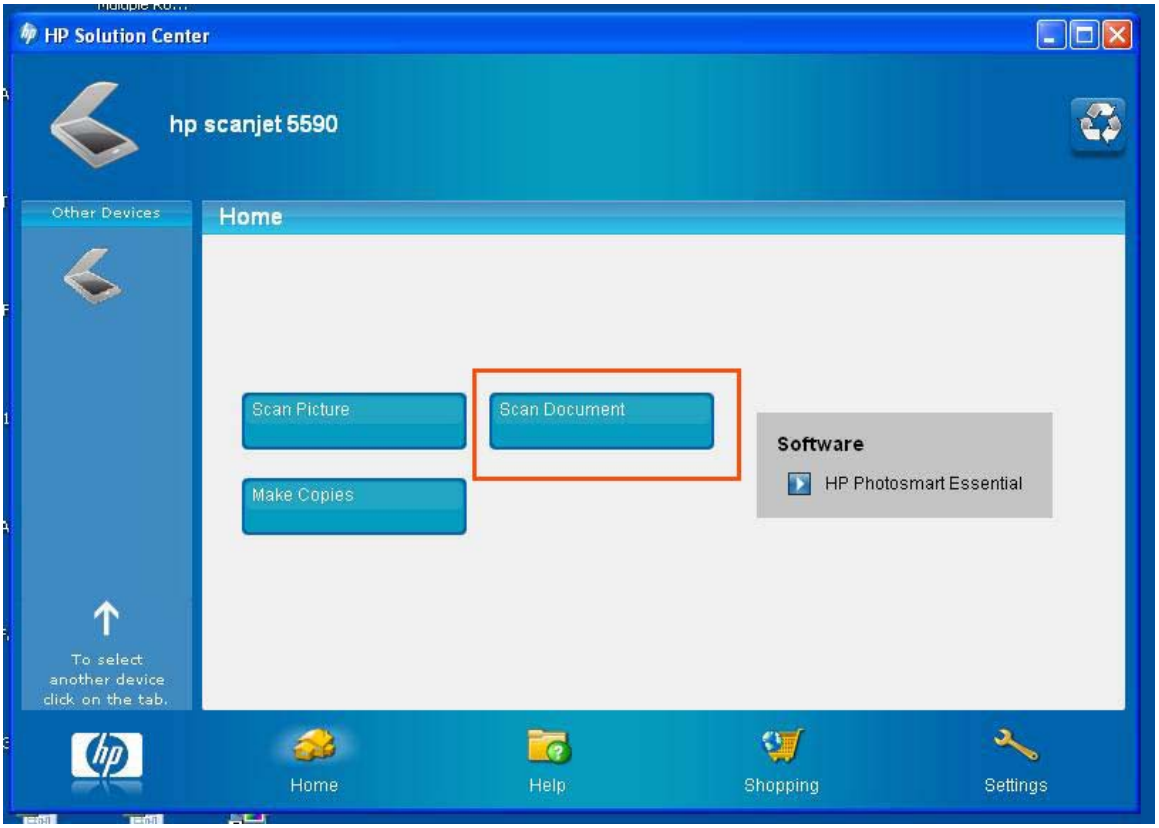
This manual will provide step-by-step instructions on how to use scanner to scan documents and use the COPA eDOCS module to upload, store, and search documents.

Scan Documents into PC

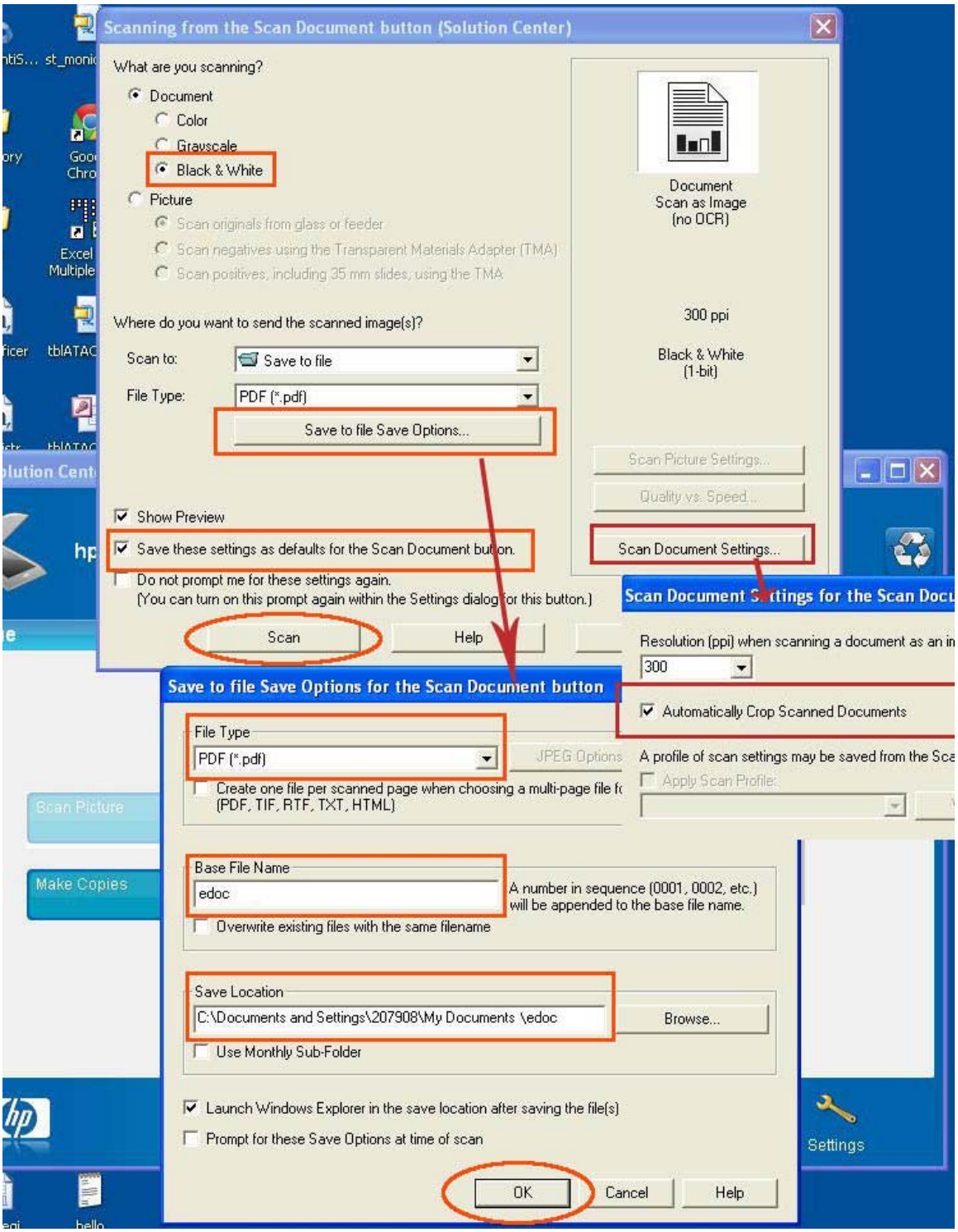
Before uploading documents to the COPA eDOCS module, documents need to be scanned into PC. HP scanner (Model: Scanjet 5590) and Software and Driver (Version: 9.0) will be used in this manual. You can download the scanner driver for Windows XP at http://h20000.www2.hp.com/bizsupport/TechSupport/SoftwareDescription.jsp?lang=en&cc=us&prodTypeId=15179&prodSeriesId=377689&prodNameId=377691&swEnvOID=228&swLang=8&mode=2&taskId=135&swItem=sj-49436-1 and select run, and then plug in the scanner. You must put documents into the feeder before you start a scan. Otherwise, only documents placed on the scanner glass will be scanned.

1. Click the icon

on the desk top, the **HP Solution Center** window will load on the monitor.

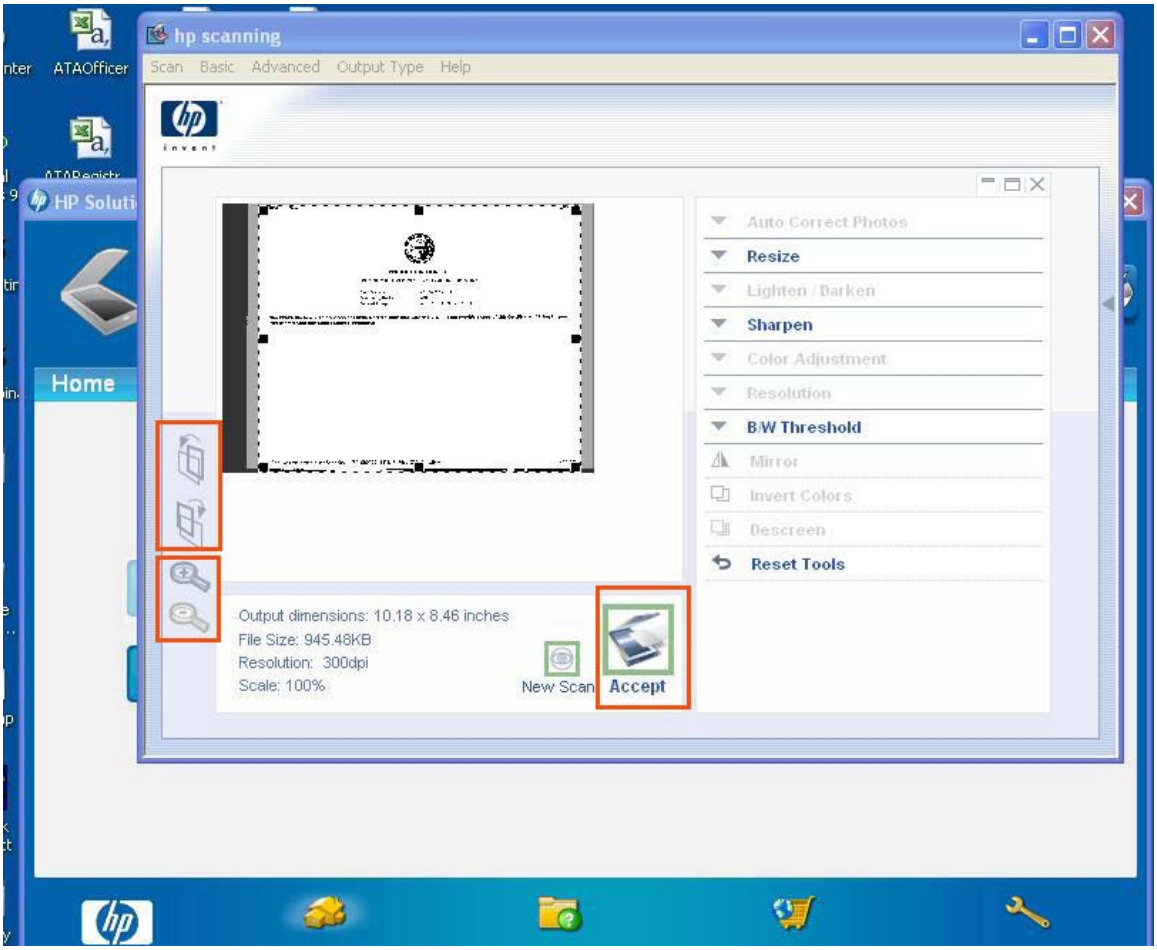


2. Click on the **Scan Document** button to open the **Scanning from the Scan Document button (Solution Center)** window. Select the appropriate options from the setup windows show below, and then click on the **Scan** button.

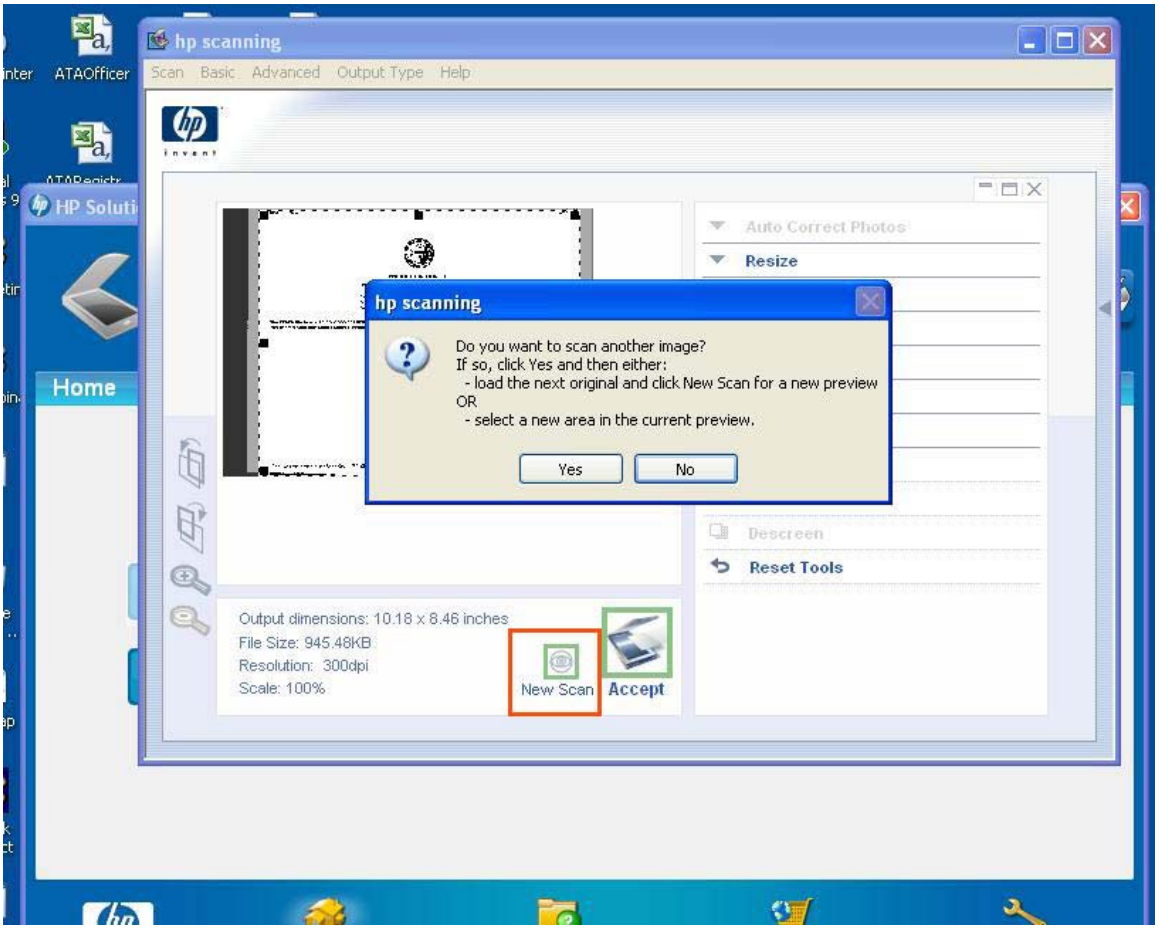

Scanning from the Scan Document button (Solution Center)
What are you scanning?
Document
Color
Grayscale
Black & White
Picture
Scan originals from glass or feeder
Scan negatives using the Transparent Materials Adapter (TMA)
Scan positives, including 35 mm slides, using the TMA
Document
Scan as Image
(no OCR)
300 ppi
Black & White
(1-bit)
Where do you want to send the scanned image(s)?
Scan to:
Save to file
File Type:
PDF (*.pdf)
Save to file Save Options...
Scan Picture Settings...
Quality vs. Speed...
Scan Document Settings...
Show Preview
Save these settings as defaults for the Scan Document button.
Do not prompt me for these settings again.
(You can turn on this prompt again within the Settings dialog for this button.)
Scan
Help
Scan Document Settings for the Scan Docu
Resolution (ppi) when scanning a document as an in
300
Automatically Crop Scanned Documents
Save to file Save Options for the Scan Document button
File Type
PDF (*.pdf)
JPEG Options
A profile of scan settings may be saved from the Sca
Apply Scan Profile:
Create one file per scanned page when choosing a multi-page file fo
(PDF, TIF, RTF, TXT, HTML)
Base File Name
edoc
A number in sequence (0001, 0002, etc.)
will be appended to the base file name.
Overwrite existing files with the same filename
Save Location
C:\Documents and Settings\207908\My Documents \edoc
Browse...
Use Monthly Sub-Folder
Launch Windows Explorer in the save location after saving the file(s)
Prompt for these Save Options at time of scan
OK
Cancel
Help
Scan Picture
Make Copies
Settings

PDF is the Standard File Type.

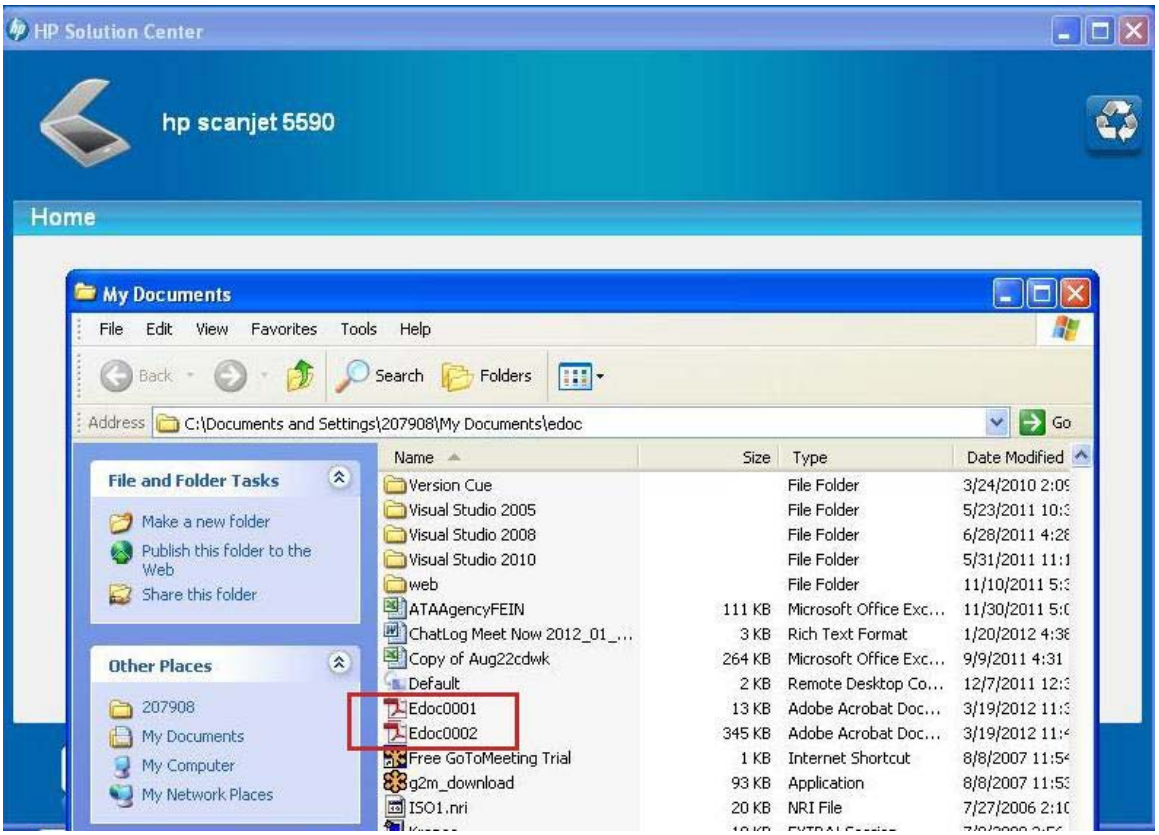
3. After clicking the Scan button, an **hp scanning** window will pop up. If a preview is displayed, make any adjustments to the scan that you want, and then click on the **Accept** button.



4. After you have completed scanning your documents, an hp scanning window will pop up. If you want to scan another document, after clicking on the **Yes** button, load another document, click on the **New Scan** icon, and then click on the **Accept** button. Otherwise, click on the **No** button.



5. After clicking on the **No** button, a document saving location window will pop up. From here, you can rename your documents.


HP Solution Center
hp scanjet 5590
Home
My Documents
File Edit View Favorites Tools Help
Back Search Folders
Address C:\Documents and Settings\207908\My Documents\edoc
Go
File and Folder Tasks
Make a new folder
Publish this folder to the Web
Share this folder
Other Places
207908
My Documents
My Computer
My Network Places
Name Size Type Date Modified
Version Cue File Folder
Visual Studio 2005 File Folder
Visual Studio 2008 File Folder
Visual Studio 2010 File Folder
web File Folder
ATAAgencyFEIN 111 KB Microsoft Office Exc...
ChatLog Meet Now 2012_01_... 3 KB Rich Text Format
Copy of Aug22cdwk 264 KB Microsoft Office Exc...
Default 2 KB Remote Desktop Co...
Edoc0001 13 KB Adobe Acrobat Doc...
Edoc0002 345 KB Adobe Acrobat Doc...
Free GoToMeeting Trial 1 KB Internet Shortcut
g2m_download 93 KB Application
ISO1.nri 20 KB NRI File

After you scan documents into PC, you can start uploading them to the COPA eDOCS.

Log into COPA

A temporary login id will be used during the training session. This login will allow you access to the COPA **Training** site. Once your agency staff has completed training, the COPA administrator in your agency/site can activate this module for user who has completed the training.

5. Type **cys.mycopa.com** in the internet browser and go to the COPA home page.
6. Enter your **User Name** and **Password**.
7. Click **Continue.**
8. COPA displays the COPA agency/site page.

Go to COPA eDOCS

On the COPA agency/site page, click on the **eDOCS** tab on the top of the screen, you will go to the eDOCS page.

Upload Documents to eDOCS

On the eDOCS page, click on the desired entity's subtab: **Staff**, the screen below will load on the page. All documents will be uploaded and assigned to this entity.

1. There are two ways to search staff whom we need to assign documents to:

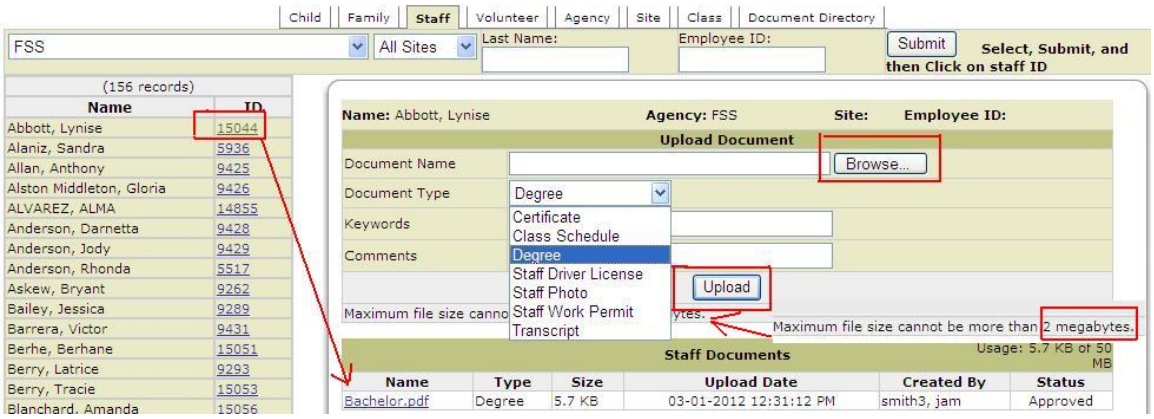
    a. For staff: search using either the last name and/or ID number

    and/or

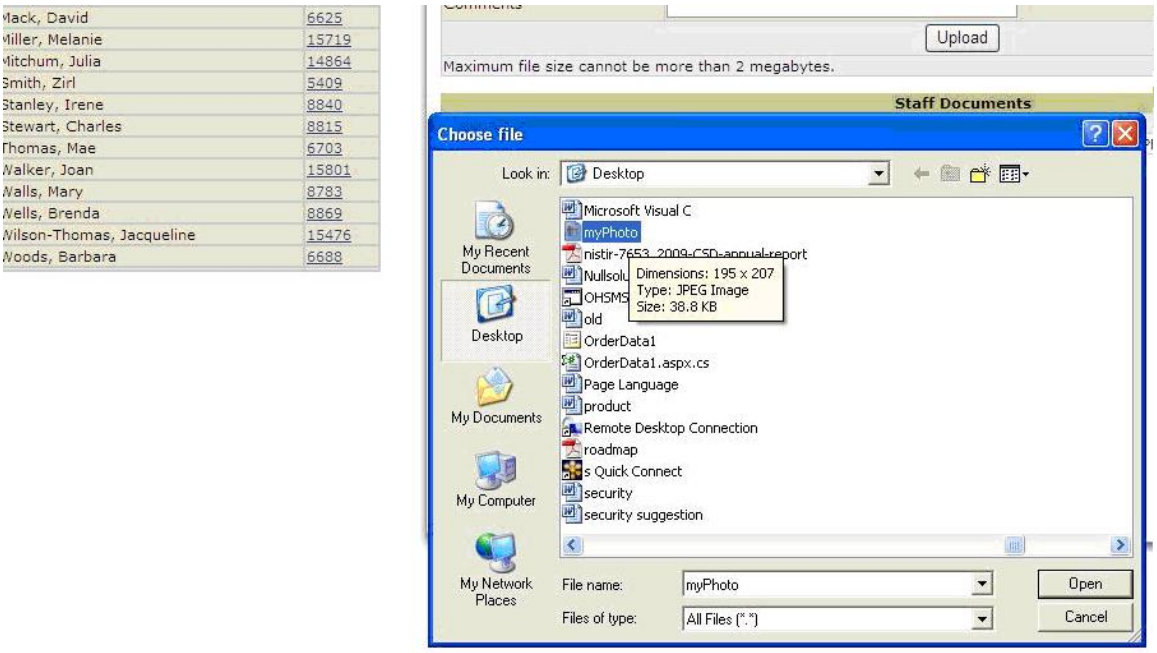
    b. Select an Agency, Site and/or Class.

    Next, click the **Submit** button, a list of the staff will load on the left-hand side.

2. Click the appropriate staff's **ID number** to load the uploading features in the main frame. Documents that have been previously uploaded will be listed.



3. Click on the **Browse** button and navigate to where the document is located on the hard drive or desktop.



4. In a **Choose File** dialog box, select a document which needs to be uploaded, and then click on the **Open** button.

9. Select a type from the **Document Type** drop-down menu.

10. Enter some keywords in the **Keywords** field. This will make it easier for you to find the document in the Document Directory later.

11. Enter any pertinent comments in the **Comments** field.

- **Keywords and Comments** are optional and can be edited later by the **COPA Admin**.

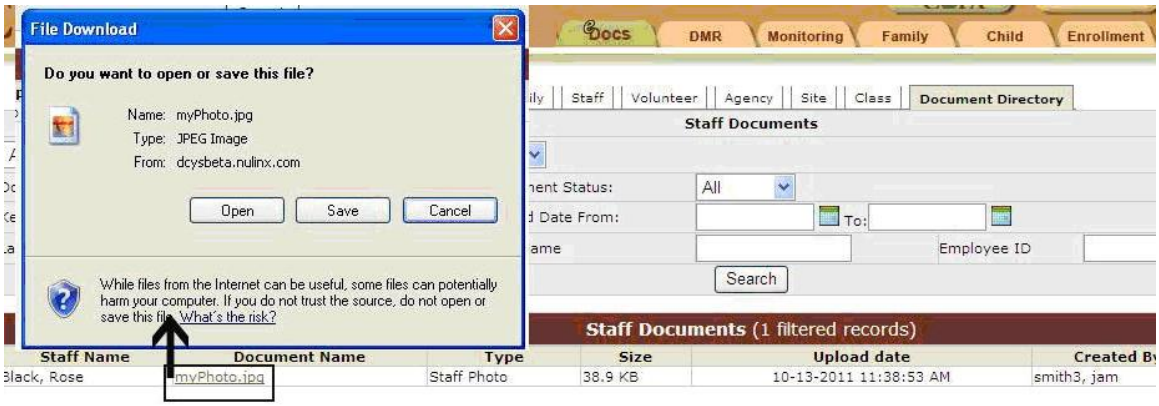
12. Click the **Upload** button to assign the document to the staff.

Search Documents

On the eDOCS page, click on the **Document Directory** subtab and select Staff from the dropdown menu, then click the **Submit** Button.

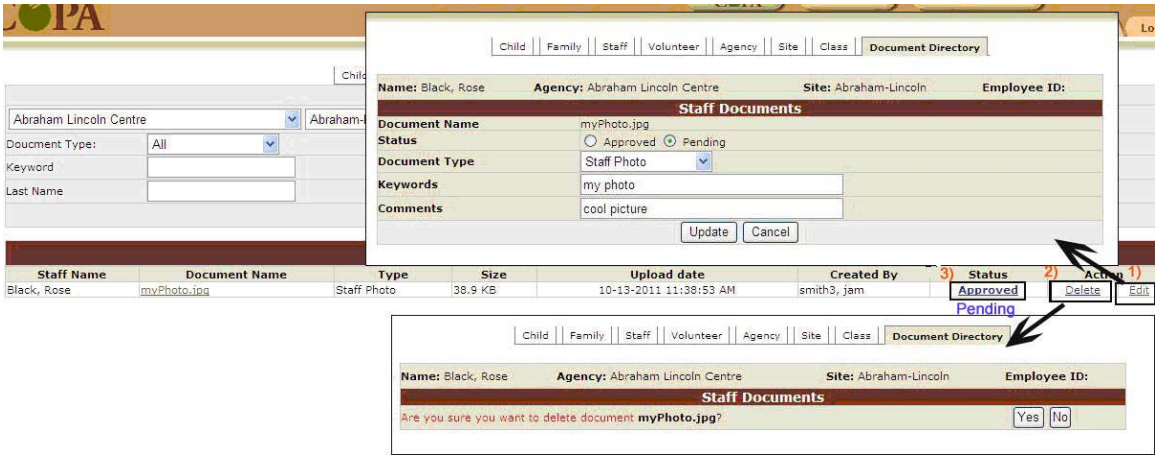
1. After clicking the submit button, the page below will populate with a list of filters and their uploaded documents. Select the filters and click on the **Search** button, the listed documents will be filtered by agency/site, document type, document status, keyword, upload period, last name, first name, or more.

2. Click the link of the document, a standard window will pop up. Click on the **Open** button to view the document.



Delete, Edit and Approve Documents

The **Delete, Edit and Approve** functionalities on the Document Directory screen can only be accessed by the COPA Admin.



1) Click on the **DELETE** link will remove the document from the entity.

2) Clicking on the **EDIT** link will edit the document **Keywords, Comments and Document Type**.

3) Clicking on the **APPROVED** link will change the status of the document to **Pending**. If the status of the document is **Pending**, the users can't view the document. The users can view the document only when the status of the document is **Approved**.